

Consumer Perception Survey

The consumer perception survey was a tool used to understand customers' current behaviors and opinions about the Downtown Rockford area. The survey element of the market research solicited specific data and feedback on community use and satisfaction with the existing character of Downtown Rockford. The survey presented an opportunity to understand current perceptions and create a baseline to determine progress through plan implementation.

Survey Design

From November 24, 2014 through January 24, 2015, the web-based survey was accessible through respondents' computers and cell phones. The City of Rockford promoted the survey via e-blasts, its website, Downtown businesses, and partnering organizations.

The survey was composed of 19 questions and took approximately 10-minutes to answer. Eighteen of the questions were multiple-choice. A summary question included a field where respondents were asked to give any additional comments. The final question asked respondents to provide their name and e-mail address so they could learn the results of the survey and assist in efforts to improve the Downtown Rockford area.

1,587 surveys were completed. Figure 1 maps the location of Survey respondents:

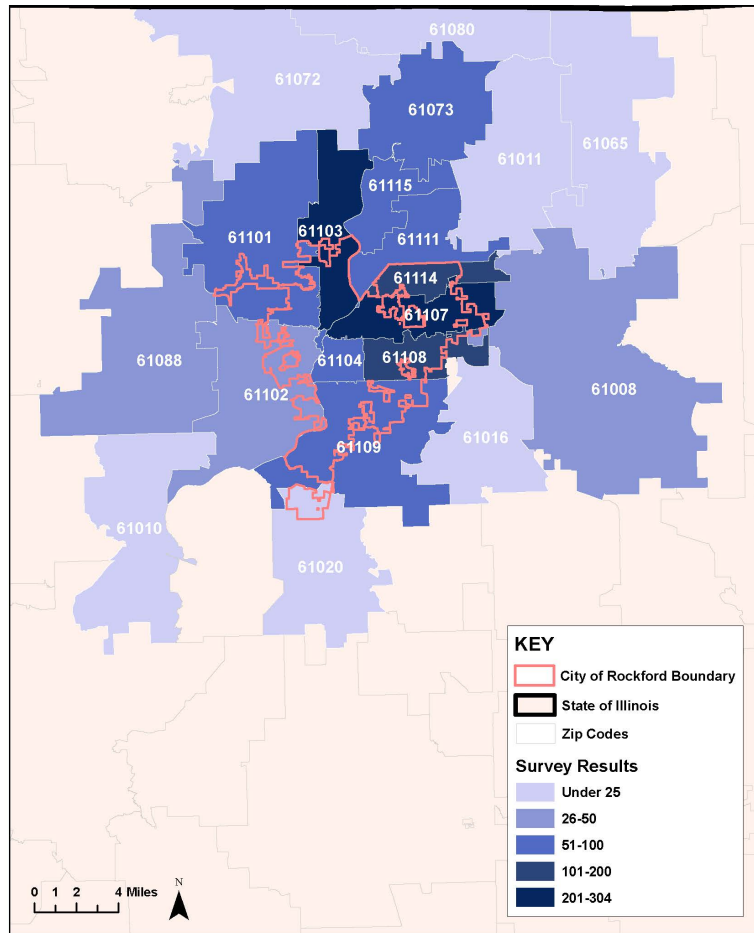


Figure 1

In calculating percentages of respondents' satisfaction or inclination to spend, "I don't know" answers were removed from the totals before rankings were created. This adjustment eliminated any potential misinterpretation that might arise when an unusually high number of "I don't know" answers reduced the other response percentages.

The analysis that follows highlights survey results that inform the planning process. The survey also provides a basis for future program analysis and can support additional research (primarily involving focus groups). Focus groups that are composed of individuals who provided specific answers can be created by using the respondent's e-mail addresses given as a reply to Question 19. After implementation, the City can repeat survey question to learn whether respondents saw improvement. The appendix provides the complete survey results.

Survey Response Findings

Current Perceptions

When Survey respondents were asked “How do outside audiences perceive Downtown Rockford as a neighborhood overall?” the response, as depicted in Figure 2, was dismal:

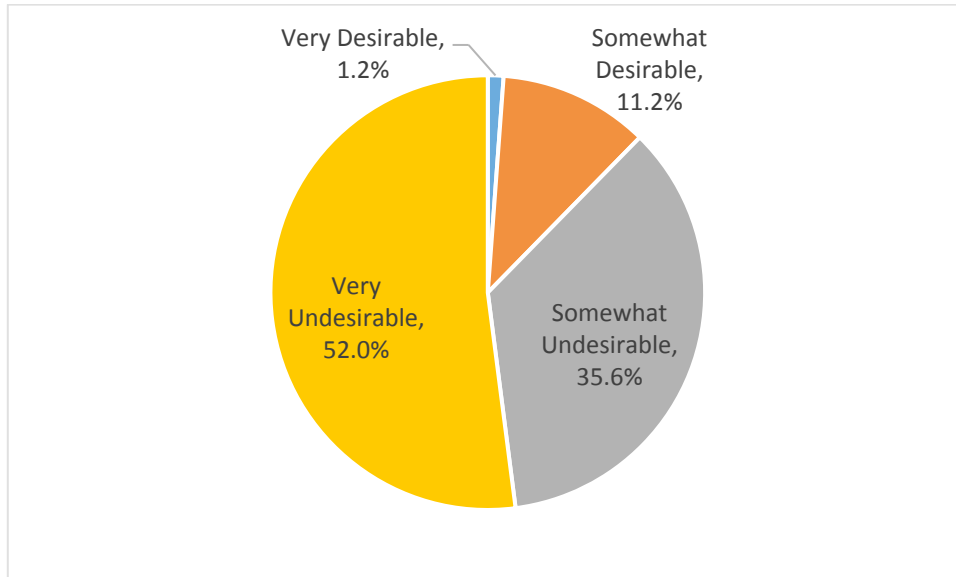


Figure 2

Interestingly, the respondents seem to feel that this perception is not necessarily correct, because only 17% answered the question “Are outside audiences' perceptions of Downtown Rockford's existing image accurate?” with “Very Accurate.”

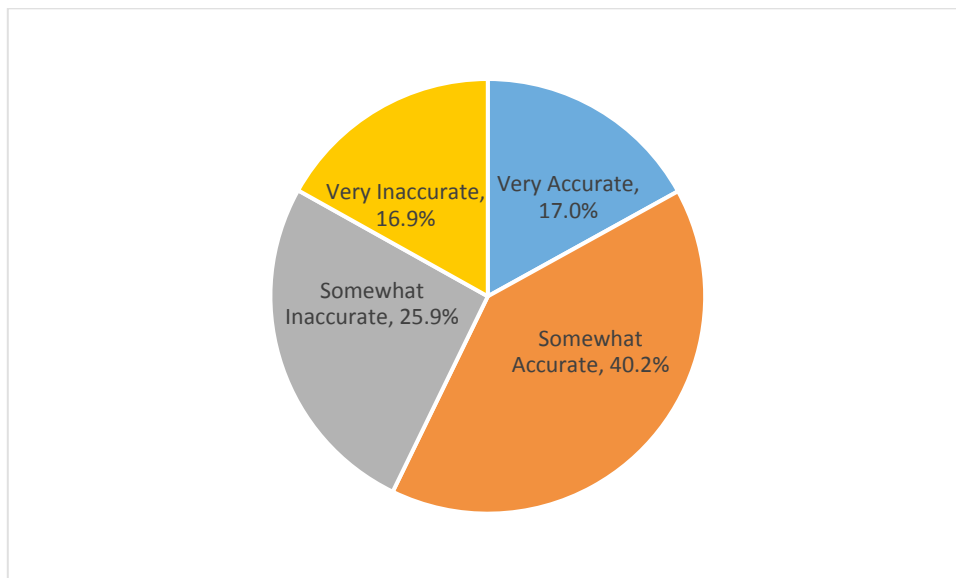


Figure 3

These results show the need to promote Downtown Rockford successes to increase the accuracy of perceptions.

When respondents were asked “How would you describe Downtown Rockford?” and given a word list, Figure 4 depicted the results by making the most commonly chosen word the largest.

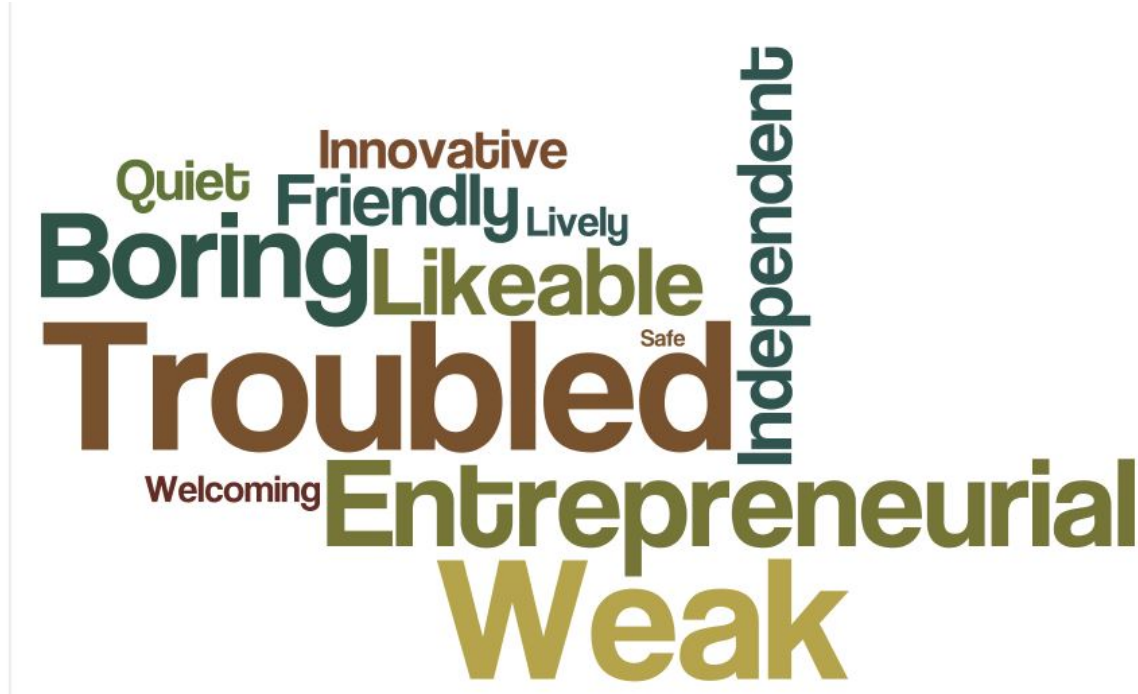


Figure 4

It is interesting that “Entrepreneurial” was the third most common choice because that is an element that was also important when respondents answered the question “How should Downtown Rockford be perceived to make it more appealing to business seeking a new location?”.



Figure 5

Another question asked the respondents to rate elements that contribute to perceptions of Downtown Rockford. In examining perceptions of an area, one must recognize that, for characteristics such as safety and parking, being average means being equal to competing options. Since those characteristics support rather than determine the experience of visiting the area, investments to improve these characteristics increase vitality only when they bring the perception into equity with competing areas. Excellent and above average ratings for other characteristics, for example friendliness, parks, and bicycle access, can increase visits by improving the quality of the visit experience.

As Table 1 highlights, Safety and Parking perceptions in Downtown Rockford are low enough to be deterring visits. Because nearly two thirds of respondents rated parking below average, parking warrants close attention.

Table 1

<i>Rate your overall satisfaction with these factors as they apply to Downtown Rockford:</i>	
Answered at least average	
General safety	41.6%
Pedestrian safety	54.0%
Parking	37.0%

The attractions, bicycle access, sidewalk and lighting attractiveness, and pedestrian access had such low ratings that one can conclude they must impact the competitiveness of Downtown Rockford businesses. These results verify the need for Rockford's Downtown Plan to guide activities, marketing, tenanting,

and access improvements because improving the perception of those characteristics will increase Downtown Rockford visits.

Table 2

<i>Rate your overall satisfaction with these factors as they apply to Downtown Rockford:</i>	
Answered at least above average	
Dining	35.2%
Parks	28.7%
Community Friendliness	24.0%
Walkability	23.3%
Bicycle Routes	19.9%
Sports Facilities	15.3%
Housing	7.0%
Shopping	6.5%
Employment	6.1%

A bright spot in the perceptions rating was the evaluation of events. When only those who attended were analyzed, Table 3 reports the evaluation of events:

Table 3

<i>Evaluate your experience at these Downtown Rockford events:</i>	
Answered at least above average	
Dinner on the Dock	74.4%
Screw City Beer Festival	72.6%
City Market	71.3%
Rockford Ice Hogs	62.6%
Friday Night Flix	59.5%
Two Block Party	55.3%
R.A.V.E. Events	53.8%
500 Block Party	53.1%

These high ratings suggest that positive experiences may change overall perceptions. The challenge is drawing customers. Table 4 reports the percentage of survey respondents who have never attended or were unfamiliar with the listed events.

Table 4

<i>Evaluate your experience at these Downtown Rockford events:</i>	
Answered never attended	
City Market	21.9%
Rockford Ice Hogs	26.5%
R.A.V.E. Events	35.9%
Dinner on the Dock	54.0%
Friday Night Flix	61.7%
Screw City Beer Festival	66.6%
500 Block Party	68.4%
Two Block Party	74.2%

Next steps

Although the current perception of Downtown Rockford presents challenges, it also identifies elements to build upon. The Downtown is recognized as an entrepreneurial center, dining is emerging as a quality use, and those who attend events enjoy the experience. City Market is emerging as a major attraction.

Current Utilization and Behavior

To help identify the baseline utilization of Downtown Rockford, the survey asked respondents about recent visits to Downtown Rockford and competing shopping districts (Table 5). The answers, detailed below, reveal that the respondents—a group that probably is more interested in Downtown Rockford than is the general population, given that they took the time to complete this survey—make more frequent visits to nearby, national chain dominated shopping clusters. Because shopping frequency is driven by necessities such as groceries, the absence of that store category impacts the shopping frequency responses. The high Internet shopping occurrence confirms that Rockford consumers are following national trends.

Table 5

<i>In an average month, how often do you visit these commercial areas?</i>	
Answered at least once	
East State Street Corridor (Alpine to I-90)	90.7%
Perryville Corridor	87.4%
East Riverside Corridor (Forest Hills to I-90)	77.1%
Amazon or other online store	71.4%
East State Street Corridor (Fairview Avenue to Alpine Road)	68.4%
Downtown (River District and/or Midtown)	67.3%
West Riverside Corridor	43.2%
11th Street (Harrison to U.S. Bypass 20)	34.1%

Because dining is so important to the success of Downtowns and Rockford has an emerging dining cluster, respondents were asked, “In the past 30 days, how many times did you eat out at restaurants?” Figure 6 illustrates their response.

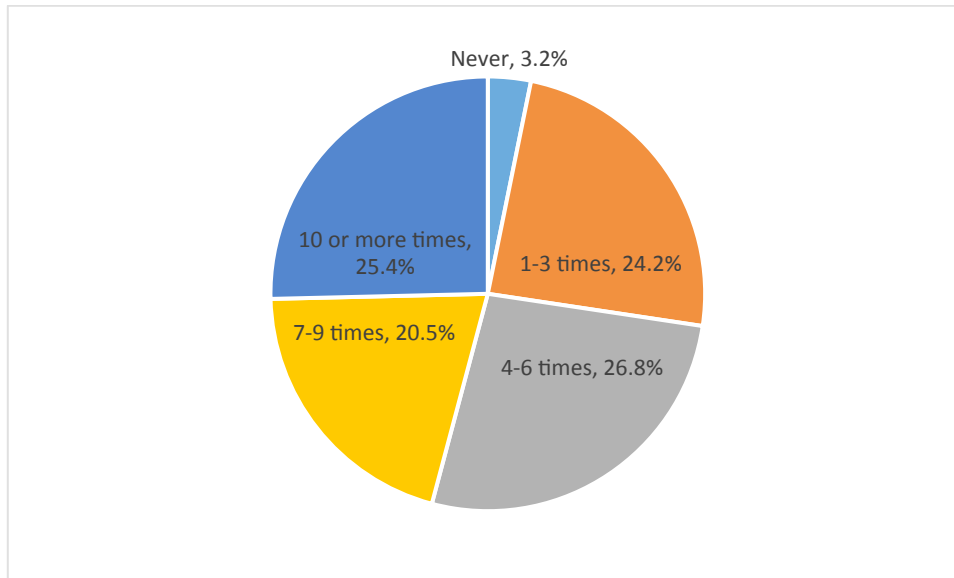


Figure 6

Next Steps

These utilization reports set a baseline for the success of Downtown Rockford initiatives to be documented by asking about utilization in future surveys.

Aspirations for the Future

The survey sought to guide this planning effort and the current property owners' recruitment focus with questions about what changes were most likely to increase visits to Downtown Rockford.

Existing restaurants should be optimistic because the majority of respondents continue to indicate they would spend more in all types of restaurants except quick serve. (Table 6) The very strong response to "Casual Dining" suggests a clear recruitment focus. Note also that nearly half of the respondents are willing to spend more in the White Tablecloth, Pub, and Counter Service restaurants suggesting opportunities for those concepts too.

Table 6

<i>How would the addition of these restaurants affect the amount of money you spend at businesses in Downtown Rockford?</i>	
Answered "I would spend a lot or a little more"	
Casual dining	70.7%
White table cloth restaurant	49.7%
Counter service restaurant	45.8%
Pub or Bar	41.4%
Quick service restaurant	36.4%

There was also interest in adding stores. (Table 7) With nearly two thirds of respondents requesting the stores selling items generally available in City Markets, the wisdom of Rockford's new market building is apparent. Existing businesses can best apply this survey information and improve sales by adopting desired formats and either stocking merchandise similar to what is carried by the requested stores or, if

already in stock, advertising the item's availability. This response should allay fears of existing businesses that competition would cannibalize current sales levels.

Table 7

<i>How would the addition of these stores affect the amount of money that you spend at businesses in Downtown Rockford?</i>	
I would spend a lot or a little more	
Fresh Produce	67.4%
Specialty Meats and Fish	64.7%
Bakery	64.4%
Apparel	55.8%
Book Store	54.4%
Fine Wine & Spirits	51.2%
Home Accessories	50.7%
Furniture	30.3%
Art Gallery	27.1%
Make-up/Cosmetics	25.6%
Bike Shop	22.4%

The strong support for home accessory, fine wine & spirits, and apparel stores can be useful information in recruitment. Existing business can seek to increase sales by offering those goods. Although "Book Store" is a top category request, few bookstores are successfully fighting the challenges presented by e-books and online sellers; however, hybrid beverage/used book stores are doing very well when they sponsor book clubs and children's reading circles. A Downtown Rockford business could examine creative ways to satisfy the bookstore desire, despite the tough market, by encouraging specialty focus and hybrid businesses for the bookstore category. The Library could "Pop-Up" in spaces in need of activation.

Figure 7 illustrates the respondent's preferences for specific stores by increasing the size of store names based on the number of times that businesses was requested.



Figure 7

When respondents were asked, “What event have you attended in another community that would be a good event for Downtown Rockford to consider holding?” Figure 8 uses a word diagram to illustrate their suggestions.



Figure 8

Next Steps

With the coming Rockford City Market, it may be useful to get more specific information about the items desired by respondent's seeking Fresh Produce, Specialty Meats and Fish, and Bakery items. The respondents desiring these items who also offered contact information could be invited to a focus group. The information on desired businesses and in events should be shared with building owners and event organizers to inform their planning processes.

Survey Summary

Surveys tell researchers what respondents think, but not the reasoning behind what they think. This survey establishes a baseline for measuring how planned changes impact Downtown Rockford utilization. A research program would repeat the survey effort in three to five years and draw conclusions on how behaviors are changing.

Based on the survey analysis, the consultants made observations about the results, but greater insight is possible if there is further communication with survey respondents. Because the survey allowed the respondents to volunteer to assist efforts to improve the Downtown Rockford area, it facilitates engaging Rockford residents. Mini-surveys can be created to seek more details from those who expressed concerns about safety or parking. Respondents also can be invited to focus groups, based on their survey answers, to provide more insight into why they responded as they did. Focus groups are a form of qualitative research in which a group of people are asked questions in an interactive group setting about their perceptions, opinions, beliefs, and attitudes towards a product, service, concept, or idea.